REQ Tool 2 – 2. Add Items and Services Page

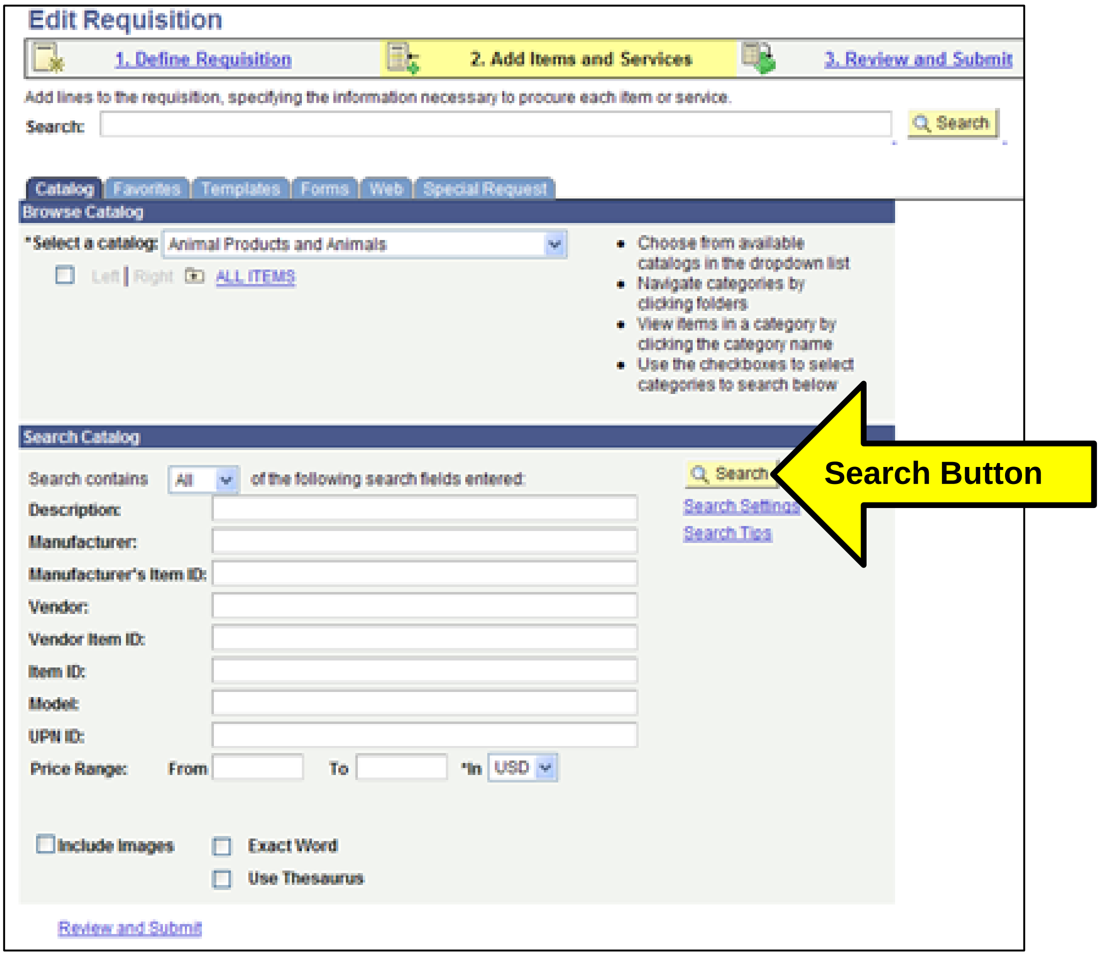
V.1.0.	03/28/2013

The purpose of this training document is to provide an overview to the **2. Add Items and Services** page in the e-Procurement module of SMART. The **Agency Requisitioner** role uses this page.

Foundation Information:

The **2. Add Items and Services** page – ***Catalog Tab*** is used to search for, locate, and add certain **Statewide Contract Items** to a requisition. If you are ordering something that is **NOT** a Statewide Contract item in the catalog, then you need to use the ***Special Request Tab***.

Note: Not all Statewide Contract items are in a SMART Catalog; however, there are thousands of Statewide contract items that can be found in a SMART Catalog. It is best to use the ***Search Catalog section*** of the Catalog Tab to filter your search criteria, and expedite the process of locating an item.

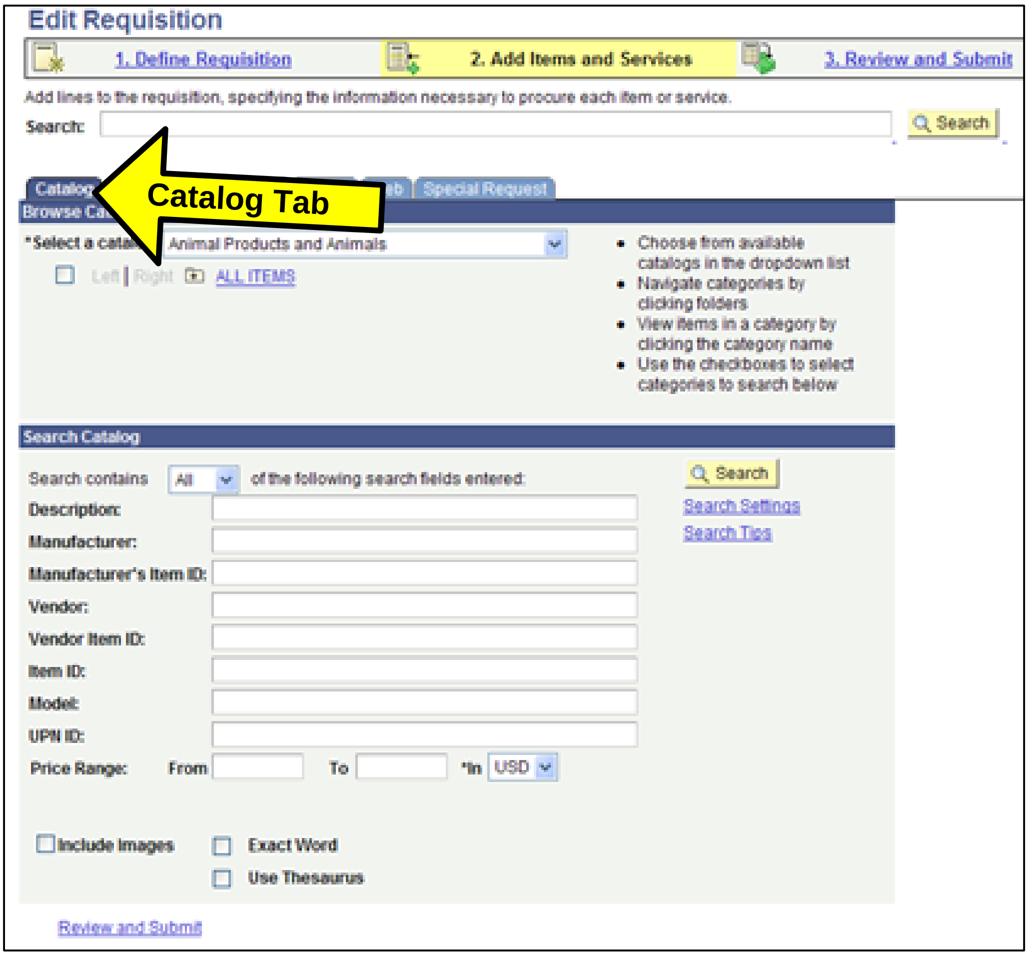


The ***'Enter' key*** on your keyboard does **NOT** work on the '**2. Add Items and Services'** page (when working with the search fields on the page).

If you use the 'Enter' key on your keyboard while using this page, you will receive an error message stating that a 'valid value' must be entered.

You ***MUST*** use the **Search buttons** provided on the page ***AFTER*** you have entered in your desired search criteria.

Hint: The ***Search Tips link*** contains tips that assist you in entering valid search criteria.



2. Add Items and Services Page – **Header Section**

Search Field: The Search box at the top of the page may be used to perform a generic search within the Catalog items of SMART.

It is ***NOT*** recommended that you use this generic search box because SMART uses a search method to retrieve all records containing the word(s) and even parts of the word(s) that you entered in the Search box.

It is better to use the ***Search Catalog section*** in the bottom half of the screen because you can filter your search criteria to narrow your search results.

2. Add Items and Services Page – **Catalog Tab**

The ***Catalog Tab*** is used to search for, locate, and add certain **Statewide Contract Items** to a requisition.

There are thousands of Statewide contract items loaded in the SMART Catalogs.

The ***Select a catalog** drop-down list allows you to choose from a narrowed list of commodities. Click the down arrow on the right side of the field to view the available catalogs from which to choose.

The **ALL ITEMS** link opens all items. Due to the number of items, it is recommended that you do NOT use this option.

2. Add Items and Services page – Catalog Tab – **Search Catalog Section**

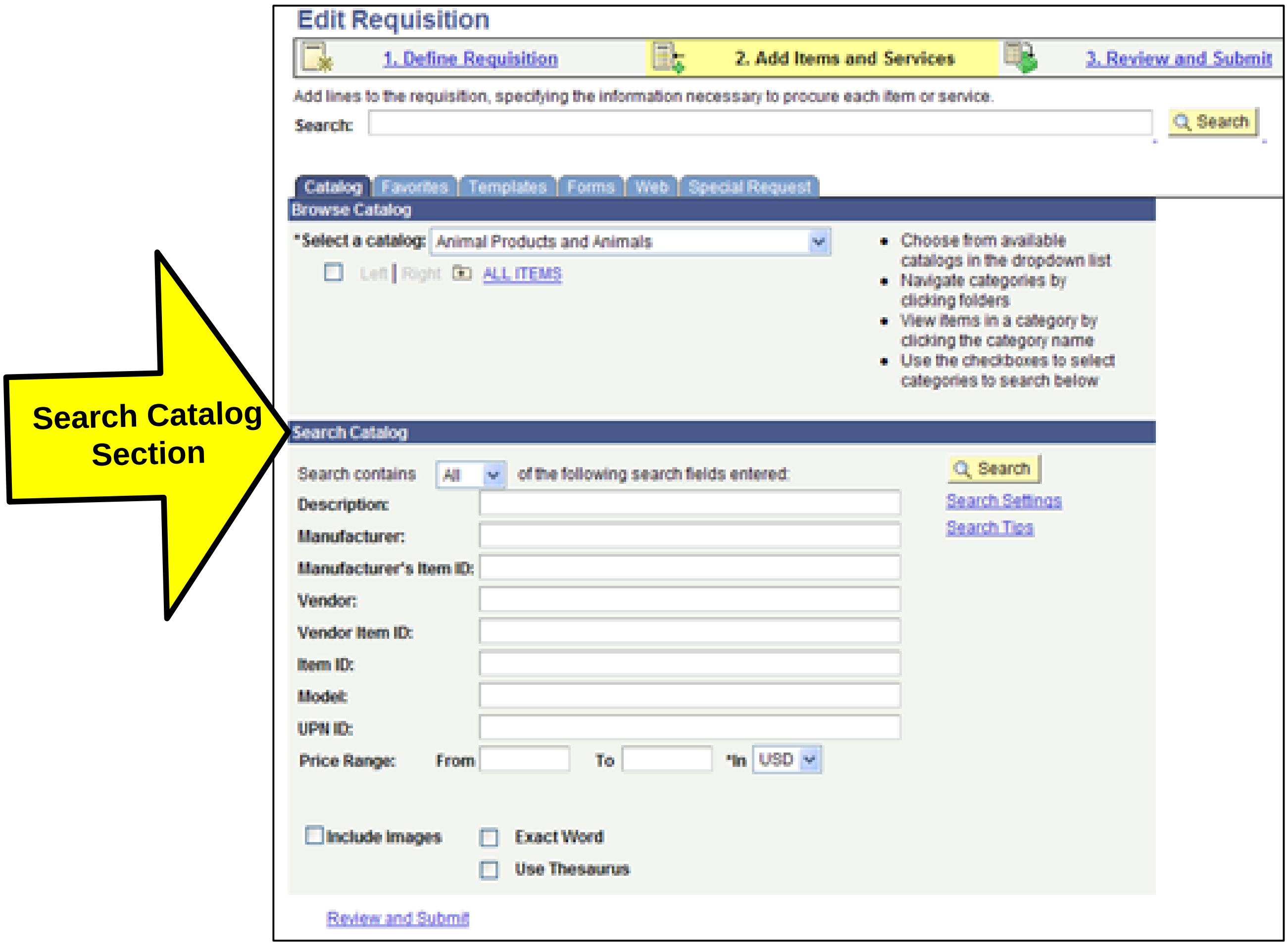
Due to the number of Statewide contract items and services loaded in to SMART, we highly recommend that you use this **Search Catalog section** to search for, locate, and add Statewide contract items to your requisition.

Description: Use this field to enter key words pertaining to the item you are searching for.

Manufacturer: Use this field to enter the name of the Manufacturer.

Manufacturer's Item ID: Use this field to enter in the number that the Manufacturer uses to identify this item.

Vendor: Use this field to enter in the ten digit Vendor ID number (which is sourced from the Vendor's file, located in the Vendor section of SMART. You must have a ***Vendor Viewer*** role in order to be able to access and view this information).



2. Add Items and Services page – Catalog Tab – **Search Catalog Section (Continued…)**

Vendor Item ID: Use this field to enter in the Vendor's item ID number (For example: vendor's SKU number)

Item ID: Use this field to enter in the 25 digit item ID number from the SMART Catalog.

Model: Use this field to enter in the manufacturer's Model number of the item you are searching for.

UPN ID: *The State of Kansas is not using this functionality in SMART*. ***Please do NOT use this field***.

Price Range: **From** field, **To** field – Use these fields to narrow the dollar value of the items for which you are searching.

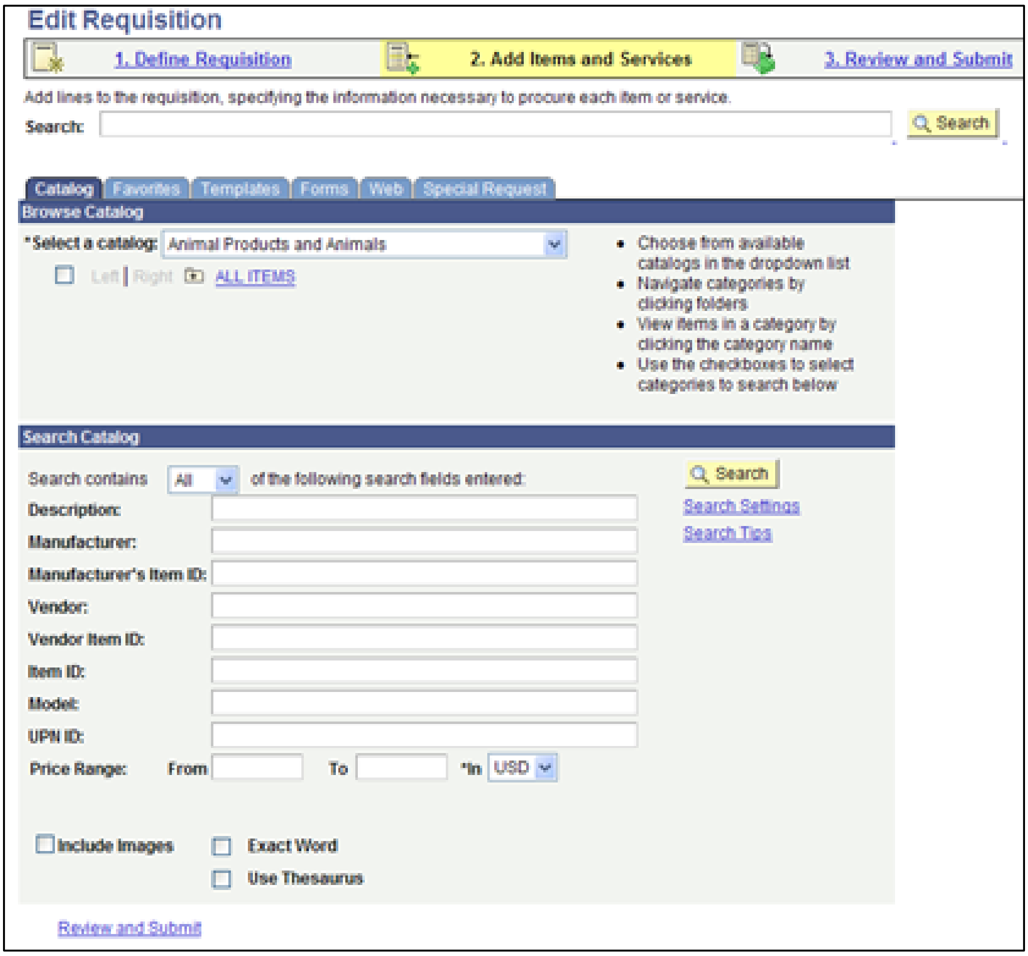
In:** The State of Kansas is ***NOT using the multi-currency functionality in SMART, therefore the default value is **USD** (US Dollars). ***Please do NOT change this value.***

Include Images checkbox: The State of Kansas is ***NOT*** using this functionality. Please do ***NOT*** select this checkbox.

Exact Word checkbox:
Select this checkbox to instruct SMART to use only the exact data entered in the search field(s).

Use Thesaurus checkbox:
The State of Kansas is ***NOT*** using this functionality. Please do ***NOT*** select this checkbox.

Review and Submit link:
AFTER you have added the item/s to the requisition, you can click this link to navigate to the '**3. Review and Submit** 'page.



Foundation Information:

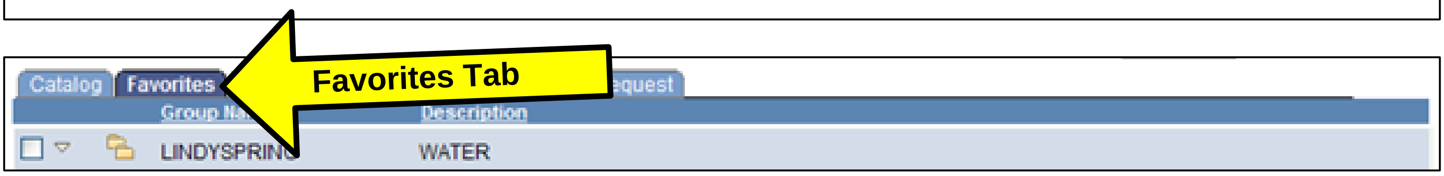
SMART will not allow the user to proceed to the '**3. Review and Submit**' page of the requisition until ***at least one item/service (one requisition line)*** has been added to the requisition. If you click on the '3. Review and Submit' link (at the bottom of page 2), or page 3's specific page title, you will receive an error message from SMART stating that no lines occur on the requisition, and SMART will NOT navigate you to that page of the requisition.

This functionality allows the flexibility for ***Agency Requisitioners*** to use the '**2. Add Items and Services**' page as an online catalog, to search for and view item information, without saving or submitting the requisition. If you wish, simply exit the requisition by clicking on the left navigation menu – SMART will display a message to ask you if you want to save the requisition [click the **OK** button to stay in the requisition] or exit the requisition without saving it [click the **Cancel** button].

2. Add Items and Services Page – **Favorites Tab**

The best way to describe ***Favorites*** is that they are the frequently used (Favorite) items/services which are ordered on a regular basis by an agency ***Requester***.

*It is important to know and understand that **Favorites are stored by Requester in SMART**.*



2. Add Items and Services Page – **Favorites Tab (Continued…)**

Items and/or Services that are selected, may be saved to a Requester's **Favorites**. This item selection is performed on the '**3. Review and Submit**' page of the requisition: At the requisition line level, using the item selection checkboxes located to the left of each requisition line.

After selecting the desired items and/or services, the '**Add to Favorites**' button is clicked. The selected line items/services are then saved to the ***Requester's*** Favorites list, and become available for future use (by ANY agency Requisitioner that is entering a requisition for that Requester).

Favorites are a fantastic efficiency tool to use in SMART, and can help expedite the entry of future requisitions in SMART.

Agency ***Requisitioners*** are able to **add and delete Favorites** from a Requester's Favorites, by using the **selection checkboxes** in conjunction with the **Add or Delete buttons** provided on the requisition pages.

How to view the details of a Favorite:

Click the **Expand button** (right facing triangle icon), located to the left of each Favorite in the list.

Clicking the Expand button opens the information for each Favorite, and changes the right facing arrow icon to a downward facing arrow icon.

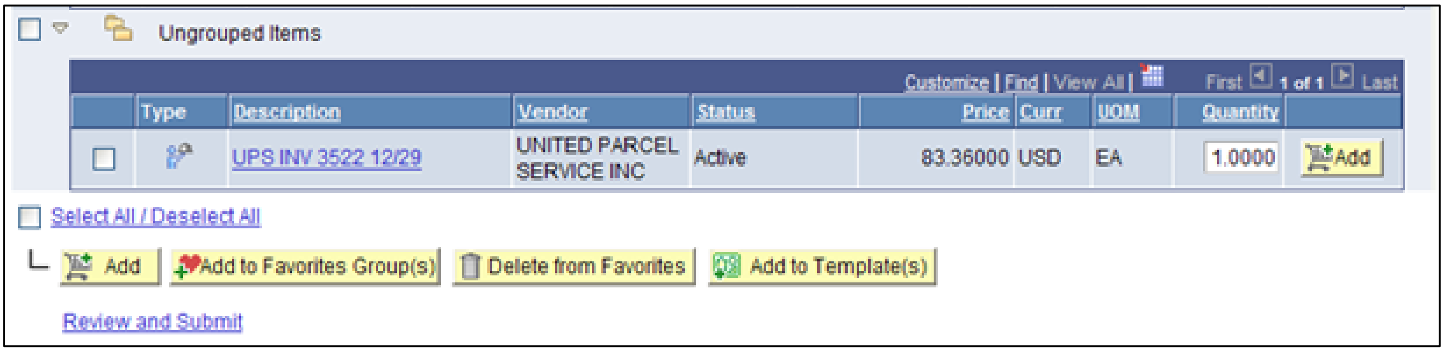
How to add a Favorite to a requisition:

1. Select the item using the **item selection checkbox** located to the left of the Favorite line.

2. Manually change the **Quantity** to the quantity desired.
   (Alternatively, you can edit the quantity on the '3. Review and Submit' page of the requisition later).

3. Click one of the **Add buttons** located on the Favorites page.
   (Clicking the Add button adds the items/services to the requisition lines).

4. Navigate to the '**3. Review and Submit'** page to view the added items/services at the requisition line level.



DO NOT ADD to Favorites:

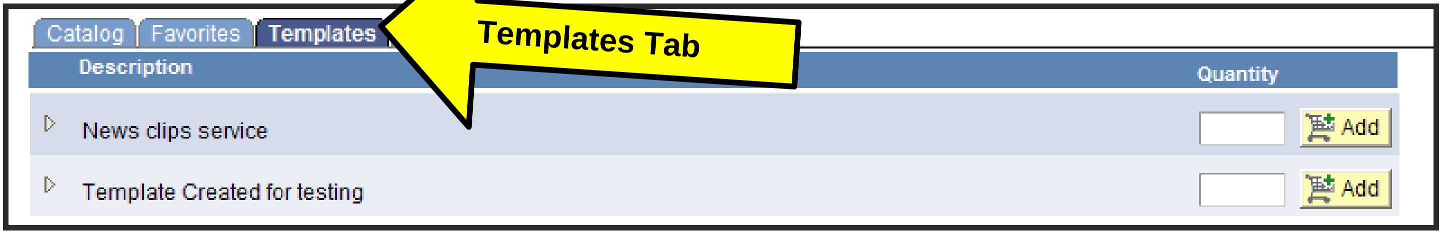
*Do **NOT** add items or services that experience regular price changes or fluctuations.*

For example: *Staples Office Supplies (prices change quarterly)*

2. Add Items and Services Page – **Templates Tab**

The best way to describe ***Templates*** is that they are the frequently used (Favorite) **items/services which are *GROUPED TOGETHER AS A TEMPLATE*** and ordered on a regular basis by an agency ***Requester***.

*It is important to know and understand that **Templates are stored by Requester in SMART**.*



2. Add Items and Services Page – **Templates Tab**

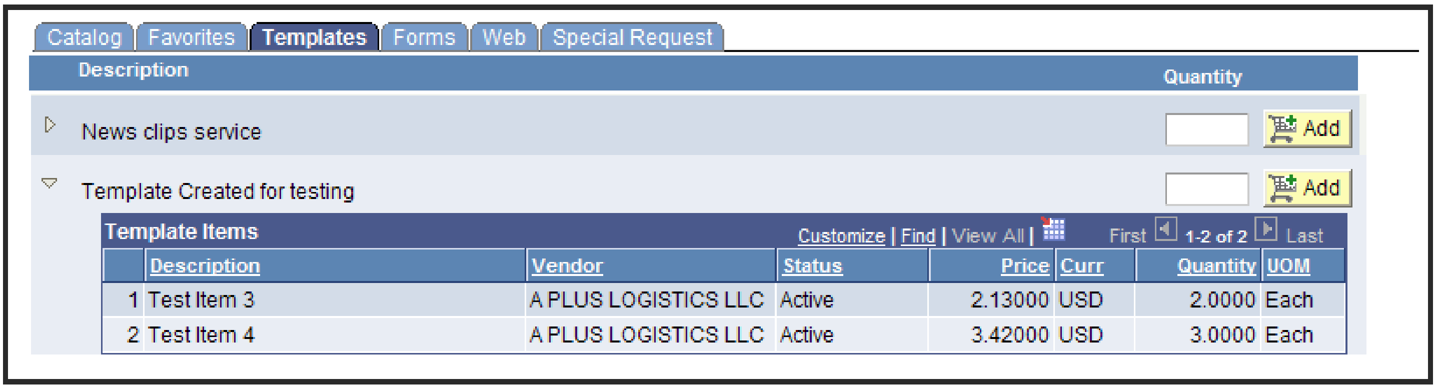
Items and/or Services that are selected, may be saved together as a group known as a **TEMPLATE**. This item selection is performed on the '**3. Review and Submit**' page of the requisition: At the requisition line level, using the item selection checkboxes located to the left of each requisition line.

After selecting the desired items and/or services, the '**Add to Templates**' button is clicked. The selected line items/services are then saved to the ***Requester's*** Templates list, and become available for future use (by ANY agency Requisitioner that is entering a requisition for that Requester).

Templates are a fantastic efficiency tool to use in SMART, and can help expedite the entry of future requisitions in SMART.

To view the details of a Template:

Click the **Expand button** (right facing triangle icon), located to the left of each Template in the list. Clicking the Expand button opens the information for each Template, and changes the right facing arrow icon to a downward facing arrow icon.



DO NOT ADD to Templates:

*Do **NOT** add items or services that experience regular price changes or fluctuations.*

For example: *Staples Office Supplies (prices change quarterly)*

(Template information continued on next page…)

To add a Template to a requisition:

1. Select the template using the **item selection checkbox** located to the left of the template line.

2. Manually change the **Quantity** to the quantity desired.
   (Alternatively, you can edit the quantity on the '3. Review and Submit' page of the requisition later).

Note: *If your template was set up with a Quantity of more than '1', then SMART will multiply the Quantity by the value you enter in to the 'Quantity' field on the Template page!*

3. Click one of the **Add buttons** located on the Templates page.
   (Clicking the Add button adds the items/services to the requisition lines).

4. Navigate to the '**3. Review and Submit'** page to view the added items/services at the requisition line level.

The State of Kansas is not using the Forms tab.

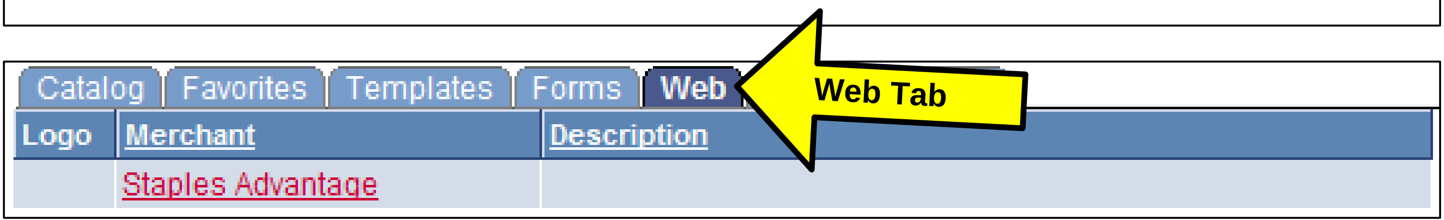
2. Add Items and Services Page – Web Tab

The **Web** tab is used to procure directly from a specific vendor. Each vendor listed on the Web tab has a direct connection built to the State of Kansas, which allows agencies to click a link, and then access, view, add to cart, and checkout from the vendor's catalog and inventory online.

At this time, the only Vendor listed on the Web tab is 'Staples Advantage'. The State of Kansas has a Statewide Contract with this vendor to purchase certain office supplies.

After 'shopping' and 'checking out' on the Staples website, you are returned to the '3. Review and Submit' page of the requisition. The items you selected from Staples appear on this page, and from there you can review, edit, and finalize certain requisition information.

For additional information regarding placing orders with Staples using the Web tab, please refer to the: **Creating Requisitions Using The Web Catalog – UPK**. (Accessed using the 'Help' link in SMART).



(Web Tab information continued on next page…)

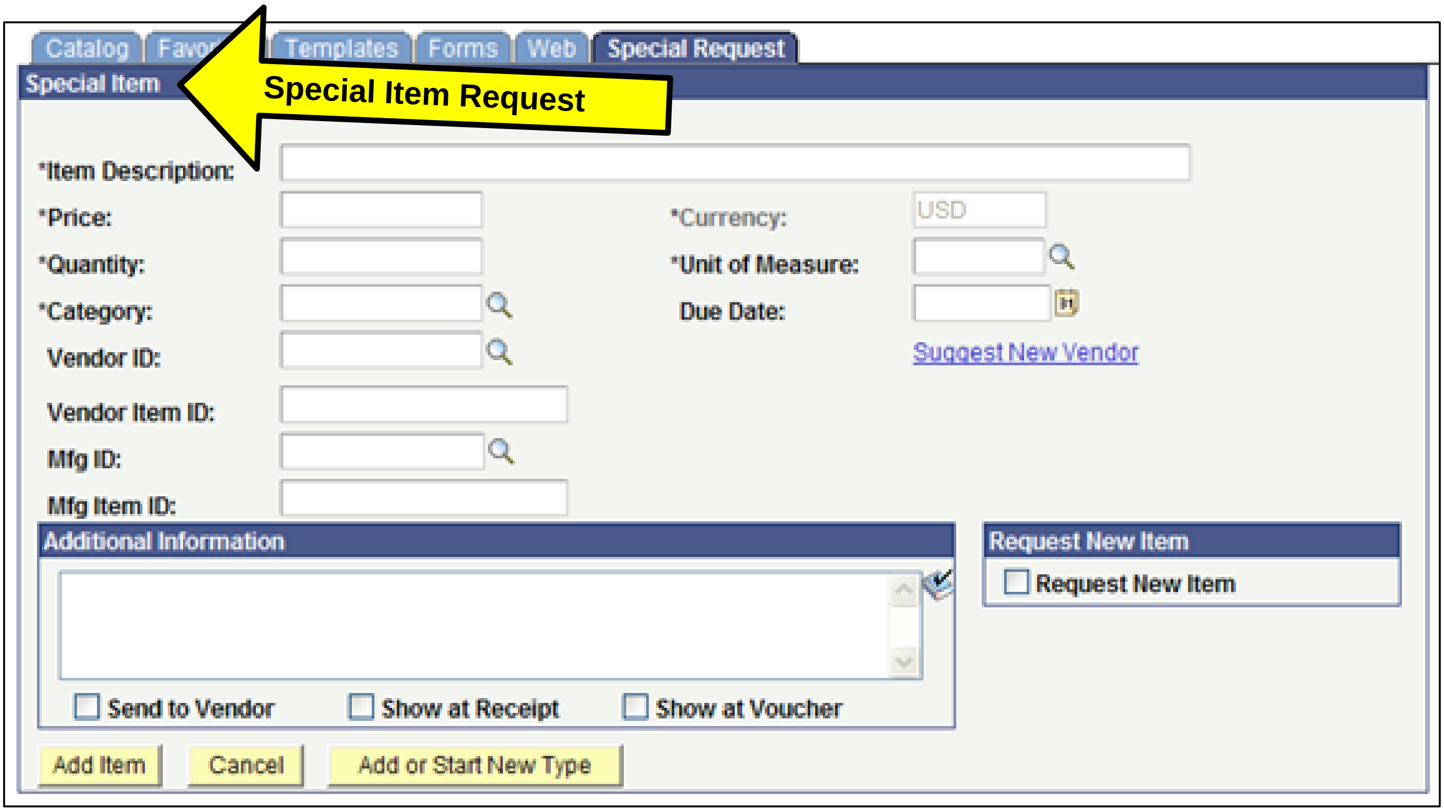
2. Add Items and Services Page – **Special Request Tab**

The ***Special Request*** tab is used by agencies to place order for items and/or services that are **NOT** a 'Catalog' (item master list) item.

There are several Special Request options available in the Special Request tab.

*Please note that the State of Kansas is **NOT** using the **Time and Materials** Special Request form.*

2. Add Items and Services Page – **Special Request Tab - Special Item Link:**

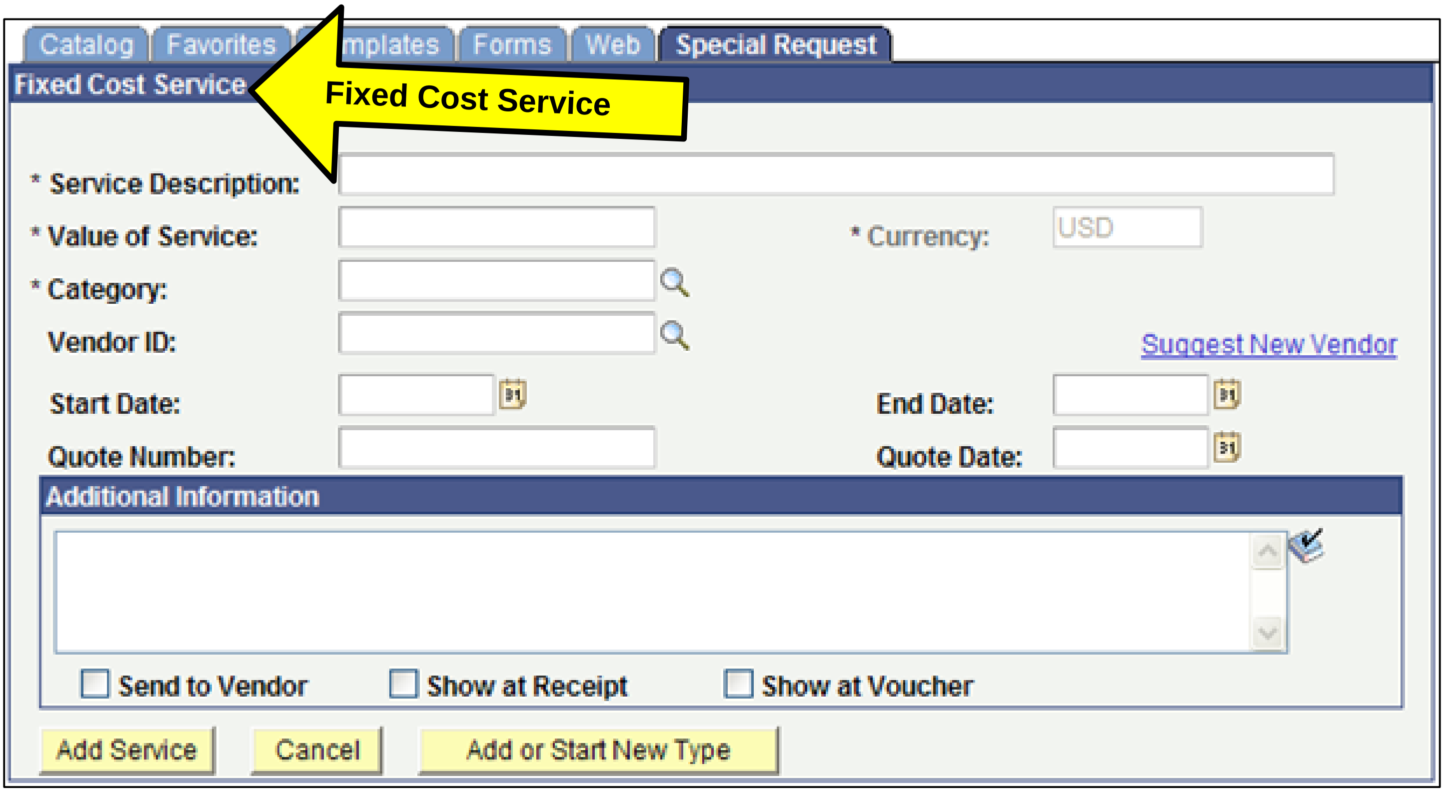


(Special Item Information continued on next page…)

Special Request - **Special Item Form:**

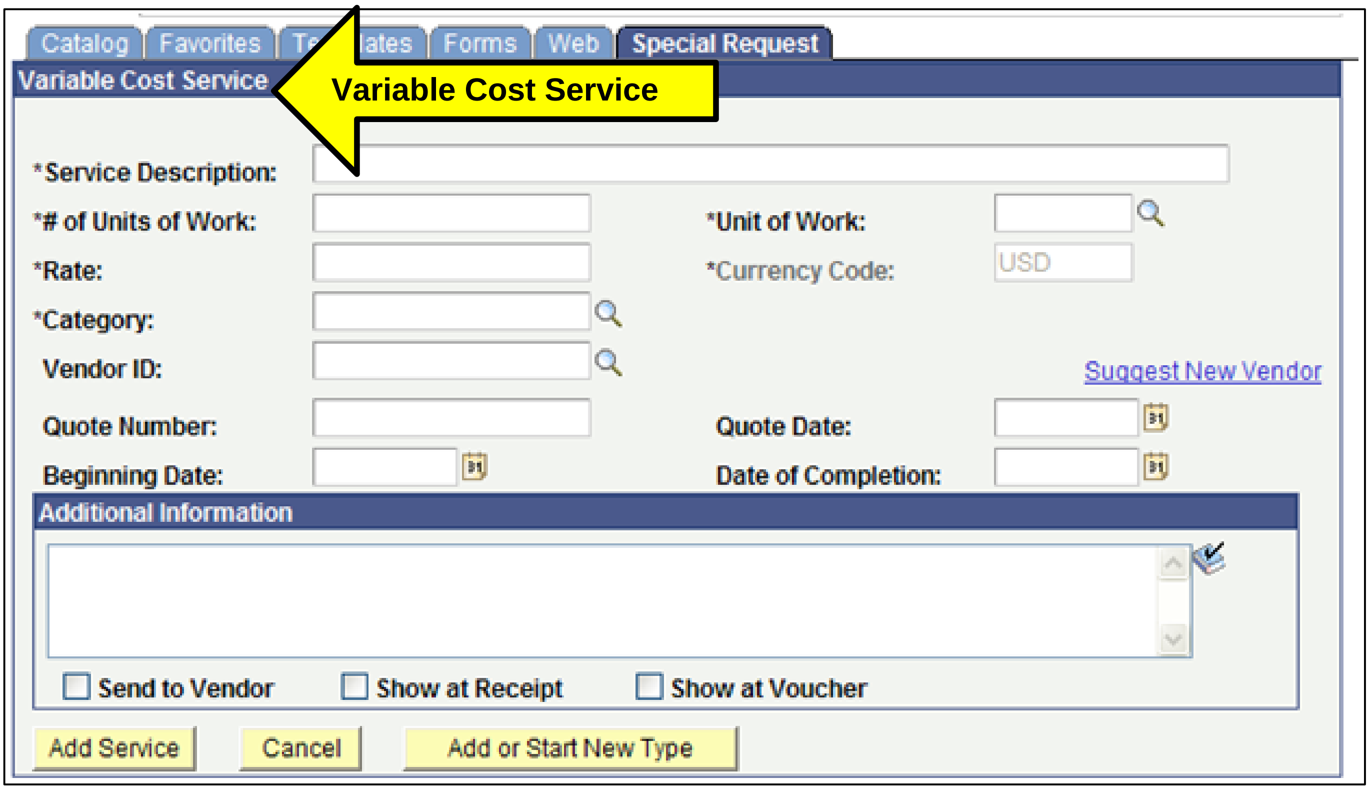
Fields	Description
Item Description	Use the **Item Description** field to enter a description of the item you are requesting. Field length is 254 characters (including spaces and punctuation).
Price	Use the **Price** field to enter the price of the item you are requesting (= price per unit of measure)
Quantity	Use the **Quantity** field to enter the quantity of the item(s) you are requisitioning.
Unit of Measure	Use the **Unit of Measure** field to enter the unit of measure (UOM) for the item(s) you are requesting. If you do not know the UOM, click the LookUp button to view and select from a list of available options.
Category	*When creating a Special Request in SMART, you MUST populate a **Category** code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Due Date	Manually enter the desired due date or click on the Calendar Page icon to select a date from the Calendar.
Vendor ID	*When creating a Special Request in SMART, you need to populate a **Vendor ID**.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please work with your agencies Buyer to find the correct Vendor ID or get a Vendor ID established.
Vendor Item ID	Use the **Vendor Item ID** field to enter a Vendor's reference or product number for the item. For example: The number/reference that the vendor uses in their catalog. This is an optional field in SMART.
Mfg ID	Use the **Mfg ID** field to enter the manufacturer's ID number in SMART. If you do not know the Mfg ID number, click the LookUp button to view and select from a list of available options. This is an optional field in SMART.
Mfg Item ID	Use the **Mfg Item ID** field to enter the manufacturer's reference or product number for the item. For example SKU (Stock Keeping Unit) number. This is an optional field in SMART.
Additional Information	Use the **Additional Information** field to enter any additional information about the item. This field is a free text field.
Send to Vendor	Use the **Send to Vendor checkbox** to display the Additional Information text to the vendor on the purchase order.
Show at Receipt	Use the **Show at Receipt checkbox** to display the Additional Information text at the receipt in SMART
Show at Voucher	Use the **Show at Voucher checkbox** to show the Additional Information text at the voucher in SMART (Accounts Payable process)
Request New Item	***The State of Kansas is not using this functionality***. Please do NOT select the Request New Item checkbox.
Add Item button	Once you have completed entering all information into the Special Item request form, click the **Add Item button** to have SMART transfer the special item information to the 3. Review and Submit page.
Cancel button	Click the **Cancel button** to cancel the special request for the item, and to return to the 2. Add Items and Services page.
Add or Start New Type Button	***The State of Kansas is not using this functionality***. Please do NOT select the Add or Start New Type button.

Special Request – **Fixed Cost Service Form:**



Fields	Description
Service Description	Use the **Service Description** field to enter a description of the item you are requesting. Field length is 254 characters (including spaces and punctuation).
Value of Service	Use the **Value of Service** field to enter the cost of this service. This amount is saved on the requisition line with the quantity *1* and the unit of measure *Each.*
Category	*When creating a Special Request in SMART, you MUST populate a **Category** code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Vendor ID	*When creating a Special Request in SMART, you need to populate a **Vendor ID**.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please work with your agencies Buyer to find the correct Vendor ID or get a Vendor ID established.
Start Date	Use this field to enter the start date of service.
End Date	Use this field to enter the ending date of service.
Quote Number	Use this field to enter the **Quote Number** received from the vendor providing the service. This is an optional field in SMART.
Quote Date	Use this field to enter the date that the **Quote** was received from the vendor. This is an optional field in SMART.
Additional Information	Use this field to enter any additional comments for the special request

Special Request – **Variable Cost Service Form:**



Fields	Description
Service Description	Use this field to specify details about the service that you are requesting.
# of Units of Work	Use this field to enter the time that is needed to complete the service, based on the unit of work. For example, 2 hours or 6 days.
Unit of Work	Use this field to enter the number of measured time-based units of work needed for the service.
Rate	Use this field to specify the unit price for this service, based on the unit of work.
Category	*When creating a Special Request in SMART, you MUST populate a **Category** code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Vendor ID	*When creating a Special Request in SMART, you need to populate a **Vendor ID**.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please work with your agencies Buyer to find the correct Vendor ID or get a Vendor ID established.
Quote Number	Use this field to enter the quote number given to you by the Vendor
Beginning Date	Use this field to enter the beginning date of service
Date of Completion	Use this field to enter the ending date of service
Additional Information	Use this field to enter any additional comments for the special request